

Seafood

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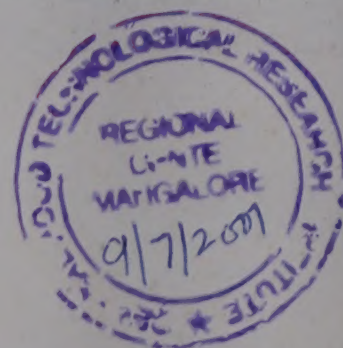
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This month

Frequently asked questions 3

The advantages of negotiating via the internet. How to use E-negotiations. A paper.

India's marine product export rises again 7

India's seafood export has increased again and the export figures of the financial year shows an increase of 28.41% in quantity terms. A detailed statistics of port, item and country wise seafood exports.

What can you do when the mercury rises? 13

When one of your customers approaches your seafood counter and says, 'I can't eat swordfish, tuna or shark because they say it is bad for you. What should you do? A report.

HACCP auditor/lead auditor training 15

MPEDA is organising a training programme in HACCP audit. The details.

Japanese importer's visit 17

Development in fish processing technology 19

In India more than 6 million people are engaged fishing and aquaculture industries. A paper on the fish processing technology and export potential.

E-Commerce 25

Business to business consortiums drive and define e-commerce value.

Taxation 37

Gist of the important changes made by the finance act 2001.

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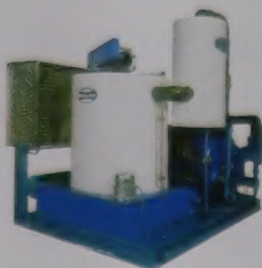
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Frequently asked questions about Business Negotiations on the Internet

Claude Cellich

Used effectively, e-mail and the web are good communication channels that business executives can use for negotiations.

Q. What are the advantages of negotiating via the Internet?

A. When negotiating from your office, you save time and money on travel. You also have access to your files, staff and any other expertise you may require to carry out the discussions to your full satisfaction.

Selecting the place of negotiation is no longer a sensitive issue. Executives from small companies with limited travel budgets and restricted office space can use the Internet to bypass these impediments. (Note that despite the benefits of negotiating from your office, it is wise to continue to travel frequently to your markets to maintain personal contact with your clients and to assess the local business environment.)

Knowing who your competitors are and what buyers are looking for are essential before replying to e-mail inquiries. The internet provides business executives with up-to-date information on competition, buyers' technical requirements and a plethora of timely marketing intelligence.

Q. Why should I take time to think through the full implications before replying?

A. Once you send a message, the recipient may view it as a "legal" or "binding" document. Written statements tend to be taken more seriously and may come back to haunt you in the future, especially if they are of a negative or unpleasant nature.

Too often, the main consideration is the need to reply as soon as possible, as many executives consider quickness in decision making a sign of superior management skills. In addition, because e-mail communication is easy and fast, there is a tendency to respond immediately without taking the time to prepare well. In fact, numerous e-commerce manuals recommend replying within 48 hours. For some business transactions, replying within 48 hours may be too long while for other it could be too short.

Payment and security are sensitive issues requiring serious assessment before responding, particularly when such requests originate from unfamiliar markets or unknown parties.

Acting quickly is easier on the Internet as you are facing a screen instead of people. Yet negotiating on the Net is no different to face-to-face negotiations. In that both require planning, preparation, patience, understanding people, knowing the needs of the other party, persuasive skills and problem-solving capabilities. It is important to give each incoming and outgoing message full consideration, including assessing how your message will affect your position vis-a-vis your competition.

If you need more time before replying, send an interim message; it is common sense and good business practice to maintain open communication lines with potential clients, while taking the time to prepare well for upcoming negotiations.

Q. When should I negotiate on the Internet?

A. On a selective basis. Initially, negotiating on the Internet should be

HOW TO USE E-NEGOTIATIONS

E-negotiations are best to...

- * Negotiate repeat business
- * Take and confirm orders
- * Initiate trade leads
- * Test the market
- * Clarify specific points
- * Furnish additional information
- * Provide after-sales service
- * Give details on shipping and deliveries
- * Communicate with existing clients
- * Check up on competition
- * Prepare for face-to-face negotiations

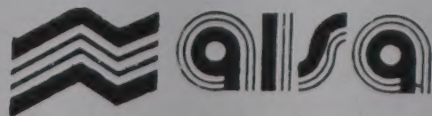
Provided you...

- * Send well-crafted e-messages
- * Consider long-term implications
- * Consult other before replying
- * Carefully review your messages before sending them
- * Be selective in replying to incoming inquiries
- * Refrain from using negative or irritating expressions
- * Adopt cooperative strategies
- * Avoid discussing pricing issues from the outset
- * Prepare thoroughly as for conventional negotiations
- * Avoid developing "screen myopia"

But be careful when...

- * Dealing with clients directly when you have agents with exclusive territorial rights
- * Charging different prices in the same target market
- * Collecting payments

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With a booming market in seafood across the globe, Alsa Marine has responded suitably with collaborations and joint ventures.

Alsa Marine has state of the art cooking and freezing plants at Calcutta and Vizag and the plant at Chennai will be ready in six months. Leased plants at Bhubaneswar, Chennai and Cochin have also been upgraded. Alsa is on a list of USFDA and two of its factories are approved for EEC.

Equipped with state of the art facilities and a

trained workforce, Alsa is poised to rapidly forge ahead into the future through a forceful expansion cum modernisation drive, at home and abroad. Alsa is recognised as a Trading House and is geared to attain Star Trading House status in the coming years.

Alsa Marine manages a 120 acre farm in Nellore, and is also an active participant in satellite farming. With a tie up with Biofeed Singapore, Alsa has brought in quality feed to the small and big farmers. Alsa Marine provides technology for different levels of culture activities; from the semi-intensive to extensive. Alsa Marine assists farmers in setting up of farms, right from selection of site to commercial operations and provides farm management assistance.

All of which will see Alsa netting more profits and precious foreign exchange from the seas.



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BRINGING ASHORE THE PROSPERITY OF THE SEAS.

limited to exchanging information, clarifying key issues or finalizing specific clauses in an agreement.

It is also an excellent medium to make arrangements for forthcoming face-to-face negotiations, such as travel bookings, fixing the agenda, selecting a location, agreeing on the number of people participating in the discussions and so on.

It is also expedient when negotiating a repeat order or a small transaction which does not justify an investment in time, personnel and financial resources.

PROS AND CONS OF E-NEGOTIATIONS

Benefits

- * Overcome time zones, location and distances
- * Minimize social barriers, eg., age, gender, position
- * Obtain instant feedback to your offers and counter proposals
- * Use inexpensive and reliable communications
- * Reduce the need to deal through intermediaries and agents
- * Negotiate simultaneously with several parties
- * Negotiate from "home base"

Disadvantages

- * Can be difficult to build trust, if used in isolation
- * Can lead to single negotiation issues centred on pricing
- * Insufficient information may be exchanged and shared
- * Greater risks due to dealing at a distance with unknown parties and markets
- * Intensifies competition
- * Reinforces buyers' negotiating power

Q. Should I negotiate electronically or insist on face-to-face meetings?

A. Do both. Until e-commerce is fully integrated in the global economy and management is committed to this new form of doing business by restructuring their processes, negotiators should combine face-to-face interaction with e-exchanges.

Despite the advantages of doing business on the Internet, when it comes to negotiations, most executives still prefer face-to-face interaction, particularly if the value of the deal justifies it. In dealing with more relationship-oriented cultures, restrict online communication to exchanging background information while discussing the main issues off-line.

Trust and confidence are difficult to establish and maintain solely using the Internet. This is particularly true in situations when one party is only interested

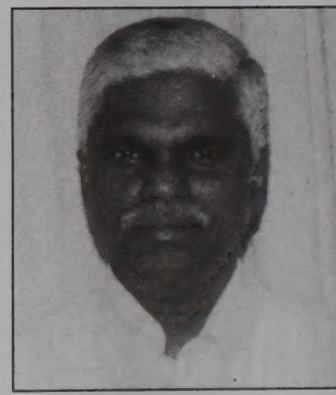
in pricing. Competitive pressures can make buyers and sellers limit their exchanges to offers and counteroffers centred on the single issue of price. Sending ultimatums like "this is my last offer" or other competitive moves tend to dominate e-negotiations. Although pricing is always a key issue in any business negotiation, in the end it is the capacity to produce the required quality and quantity, timely delivery and the firm's reputation that will influence the decision. For this reason, each party should explore in detail what is required and develop sound proposals that will withstand competitive pressures and lead to repeat orders in the long run.

Claude Cellich, Vice-President of the International University of Geneva, Switzerland, formerly served as ITC's Chief of Human Resource Development. He can be contacted at info@iun.ch

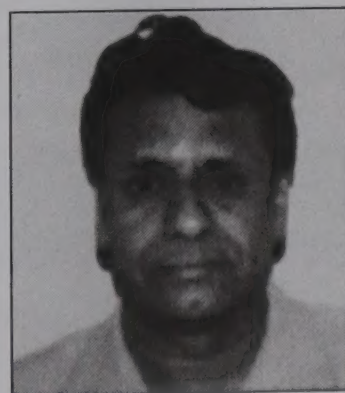
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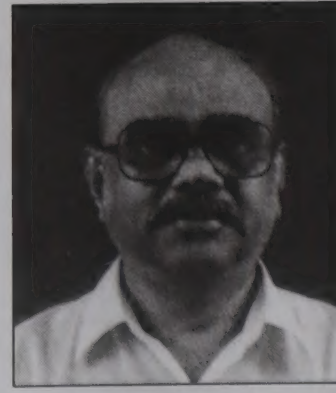
D.V. Prasad IAS takes charge as the Director (M) of MPEDA



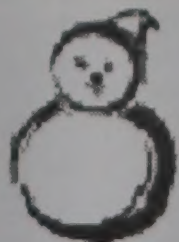
R. Ganapathy former Secretary MPEDA takes charge as the Director



Dr. G. Sandhanakrishnan takes over as Secretary MPEDA



V. Venkatesan, Director MPEDA retired from the service after his 19 yrs service



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Indian Marine Product export rises again

India's seafood export has increased again and the export figures of April-March 2000-2001 indicates 28.41% increase in quantity terms, 25-94% in value terms and 19.12% in US dollar terms, comparing to the same period of last years.

The total export during this period is 440473 M.tons while it was 343031 M. tons during April-March 1999-2000.

Japan continues to be the top buyer of Indian seafood this year also. This accounts for 39.73%. USA is the second largest buyer of Indian seafood. This accounts for 18.07%.

Frozen shrimp is again the major item of our marine product export during this financial years also contributing to 69.55%. The second major items is Frozen fin fish. This accounts for 13.57%.

In value terms Chennai is on the top of export activities with its share of 27.41%. But in quantity terms, Cochin port is on the higher side with its share of 20.06%.

ITEM-WISE EXPORT OF MARINE PRODUCTS

(Summary)

Q: Quantity in M.tons V: Values in Rs. Crores \$:US Dollar Million

Item	%share to total		APR-MAR 2000-2001	APR-MAR 1999-2000	VARIATION	(%)
Frozen Shrimp	25.40	Q	111874	110275	1599	1.45
	69.55	V	4481.51	3645.22	836.29	22.94
	69.55	\$	985.00	847.07	137.93	16.28
Frozen Fin fish	48.34	Q	212903	131304	81599	62.15
	13.57	V	874.68	537.34	337.34	62.78
	13.57	\$	192.25	124.87	67.38	53.96
Frozen Cuttlefish	7.65	Q	33677	32799	878	2.68
	4.48	V	288.99	286.22	2.77	0.97
	4.48	\$	63.52	66.51	-2.99	-4.50
Frozen Squid	8.54	Q	37628	34918	2710	7.76
	5.03	V	324.43	296.80	27.63	9.31
	5.03	\$	71.31	68.97	2.34	3.39
Dried items	1.71	Q	7512	6576	936	14.23
	1.09	V	70.03	42.77	27.25	63.71
	1.09	\$	15.39	9.94	5.45	54.83
Live items	0.42	Q	1844	1678	166	9.90
	0.62	V	39.88	37.99	1.90	4.99
	0.62	\$	8.77	8.83	-0.06	-0.68
Chilled items	0.87	Q	3820	3088	732	23.72
	1.11	V	71.63	44.97	26.66	59.27
	1.11	\$	15.74	10.45	5.29	50.62
Others	7.09	Q	31215	22393	8822	39.40
	4.54	V	292.74	225.36	67.37	29.90
	4.54	\$	64.34	52.37	11.97	22.86
Total	100.00	Q	440473	343031	97443	28.41
	100.00	V	6443.89	5116.67	1327.22	25.94
	100.00	\$	1416.32	1189.00	227.31	19.12

Fish Oils Help Dyslexic Children

Children with dyslexia and other learning problems can benefit from fish oils. According to scientists from the Imperial College School of Medicine in London and the University of Oxford, children given the oils were less anxious, more able to concentrate and significantly better behaved than before. Study results will

be presented at the British Dyslexia Association's conference at York University alongside other work suggesting that a bodily deficiency of fats of the type found in fish oil may cause, or at least exacerbate, problems in some children who have trouble with their reading and behavior

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Nas Marine Products

PORT WISE EXPORT OF MARINE PRODUCTS

Q: Quantity in M.tons V: Values in Rs. Crores \$: US Dollar Million

Ports	%share to total		APR-MAR 2000-2001	APR-MAR 1999-2000	VARIATION	(%)
KANDLA	9.13	Q	40228	38101	2127	5.58
	3.77	V	242.98	212.13	30.84	14.54
	3.77	\$	53.40	49.30	4.11	8.34
PORBANDAR	7.20	Q	31712	33146	-1434	-4.33
	1.99	V	127.95	157.59	-29.65	-18.81
	1.99	\$	28.12	36.62	-8.50	-23.21
MUMBAI	3.97	Q	17467	26583	-9117	-34.30
	3.12	V	200.73	217.03	-16.29	-7.51
	3.12	\$	44.12	50.43	-6.31	-12.51
J N P	22.78	Q	100348	56428	43920	77.83
	10.72	V	690.69	443.78	246.91	55.64
	10.72	\$	151.81	103.12	48.68	47.21
GOA	2.01	Q	8849	9658	-809	-8.38
	0.43	V	27.92	36.55	-8.63	-23.61
	0.43	\$	6.14	8.49	-2.36	-27.80
MANGALORE/ICD	0.86	Q	3781	14	3767	-
	0.34	V	21.98	1.70	20.28	1189.35
	0.34	\$	4.83	0.40	4.44	1110.00
KARWAR	0.55	Q	2410	0	2410	0.00
	0.12	V	7.53	0.00	7.53	0.00
	0.12	\$	1.65	0.00	1.65	0.00
KOCHI	20.06	Q	88355	91543	-3188	-3.48
	16.04	V	1033.65	1137.08	-103.43	-9.10
	16.04	\$	227.19	264.23	-37.04	-14.02
TRIVANDRUM	0.11	Q	497	605	-107	-17.71
	0.20	V	12.82	9.88	2.94	29.78
	0.20	\$	2.82	2.30	0.52	22.61
TUTICORIN	3.91	Q	17233	17818	-585	-3.28
	7.74	V	498.71	411.98	86.73	21.05
	7.74	\$	109.61	95.74	13.88	14.50
CHENNAI	8.12	Q	35772	25646	10126	39.48
	27.41	V	1766.07	1050.71	715.37	68.08
	27.41	\$	388.17	244.16	144.01	58.98
VIZAG	5.23	Q	23050	23721	-672	-2.83
	15.10	V	972.72	906.50	66.22	7.30
	15.10	\$	213.80	210.65	3.15	1.50
PARADEEP	0.00	Q	0	0	0	0.00
	0.00	V	0.01	0.00	0.01	0.00
	0.00	\$	0.00	0.00	0.00	0.00
CALCUTTA	4.21	Q	18553	16397	2155	13.15
	9.24	V	595.40	512.07	83.33	16.27
	9.24	\$	130.86	118.99	11.87	9.98
PIPAVAV	11.86	Q	52219	3371	48849	1449.14
	3.80	V	244.72	19.66	225.06	1144.89
	3.80	\$	53.79	4.57	49.22	1077.02
Total	100.00	Q	440473	343031	97443	28.41
	100.00	V	6443.89	5116.67	1327.22	25.94
	100.00	\$	1416.32	1189.00	227.31	19.1

U.S. OKS
NIGERIAN
SHRIMP IMPORTS

Nigeria's renewed interest in the protection and management of the environment for sustainable development has been recognized by the U.S. government, which has endorsed the country to export all categories of shrimps into the United States next year.

The news came in a letter delivered by the U.S. Embassy's political-economic officer in Nigeria, Crystal Kaplan, to the Minister of State for Environment, Dr. Imeh Okopido. The letter indicated that Nigeria is certified under American public law for the scheme.

A statement by Olusegun Falodun, the personal assistant to the minister, quoted Kaplan as saying that the Bush administration's certification had been forwarded to the U.S. Congress and that the countries were free to export shrimps to the United States under the stipulated law and regulation.

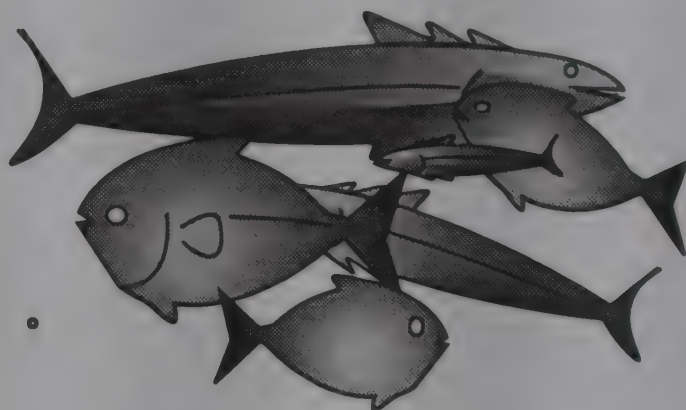
According to Kaplan, Belize, Colombia, Costa Rica, Ecuador, El-Salvador, Guatemala, Guyana, Honduras, Indonesia, Mexico, Nicaragua, Nigeria and Pakistan are among the countries certified.

Panama, Thailand, Trinidad and Tobago as well as Venezuela had been also certified and had provided documentary evidence of a comparable regulatory program governing the taking of the relevant species of sea turtles in the course of commercial shrimp harvesting.

Citing Section 609 of the U.S. public law, shrimps harvested with commercial fishing technology that may adversely affect certain species of sea turtles protected under the country's laws and regulations may not be imported into the United States unless the president certifies to Congress.

Section 69 of the law also states that shrimps from other nations that may have been harvested in a manner harmful to sea turtles will be embargoed.

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COUNTRY-WISE EXPORT OF MARINE PRODUCTS

(Summary)

Q: Quantity in M.tons V: Values in Rs. Crores \$: US Dollar Million

Country	%share to total		APR-MAR 2000-2001	APR-MAR 1999-2000	VARIATION	(%)
Japan	15.66	Q	68983	66990	1993	2.98
	39.73	V	2560.39	2272.78	287.61	12.65
	39.73	\$	562.75	528.14	34.61	6.55
USA	9.48	Q	41747	36645	5102	13.92
	18.07	V	1164.40	775.35	389.05	50.18
	18.07	\$	255.93	180.17	75.75	42.04
European Union	15.63	Q	68827	65402	3425	5.24
	15.91	V	1025.36	905.56	119.80	13.23
	15.91	\$	225.37	210.43	14.93	7.09
CHINA	41.49	Q	182771	107136	75636	70.60
	12.84	V	827.42	544.70	282.72	51.90
	12.84	\$	181.86	126.58	55.28	43.67
South East Asia	9.25	Q	40748	38297	2451	6.40
	7.18	V	462.97	360.17	102.80	28.54
	7.18	\$	101.76	83.70	18.06	21.58
Middle East	3.91	Q	17236	12460	4776	38.33
	2.92	V	188.32	109.49	78.83	71.99
	2.92	\$	41.39	25.44	15.95	62.70
OTHERS	4.58	Q	20161	16100	4060	25.22
	3.34	V	215.04	148.62	66.42	44.69
	3.34	\$	47.26	34.54	12.73	36.86
TOTAL	100.00	Q	440473	343031	97443	28.41
	100.00	V	6443.89	5116.67	1327.22	25.94
	100.00	\$	1416.32	1189.00	227.31	19.12

FISH SALES SOAR IN U.K.

Brits lose taste for meat in disease crises

Fish sales have reached record levels in the wake of the BSE and foot and mouth crises, a new government survey has revealed.

Fish consumption per person went through the roof in the first three months of this year as Brits lost their appetite for meat. And home consumption of beers, wine and spirits are also on the increase.

During the first quarter of 2001, Brits got through an average of 154 grams a week each of fish compared to 133 grams a year ago - a rise of 16 percent.

Meanwhile consumption of beef, lamb and pork were all lower than in the first quarter of last year as prices were respectively 2 percent, 6 percent and 5 percent higher.

The National Food Survey report by the Ministry of Agriculture Fisheries and Food stated: "Per capita consumption of fish in the home rose to just above its highest ever first quarter level."

It pointed out consumption in the first quarter of last year was at its lowest quarterly level for eight years.

But compared with the first quarters of the three preceding years - 1997 to 1999 - consumption in the first quarter of 2001 was still about 3 percent higher on average.

The survey of 1,500 households found consumption of beef and veal was 10 percent lower than in the first quarter of 2000. But this fall was partly due to the fact consumption last year was the highest quarterly consumption since the first quarter of 1995.

But purchases of lamb were down 20 percent to the lowest first quarter level on record and consumption of pork was 15 percent down from a year ago - also the lowest first quarter level on record.

The survey also showed home consumption of alcoholic drinks rose strongly on last year when prices of beer and lager were much higher - 408 milliliters per person a week compared to 287 a year ago.

The report said: "The average price paid for wine for consumption in the home fell by 12 percent compared with the first quarter of last year - and consumption rose by 15 percent."

Purchases of fats and oils rose by 6 percent year-on-year mainly due to increased consumption of vegetable and salad oils and butter.

But the level was not much higher than in the first quarter of 1998.

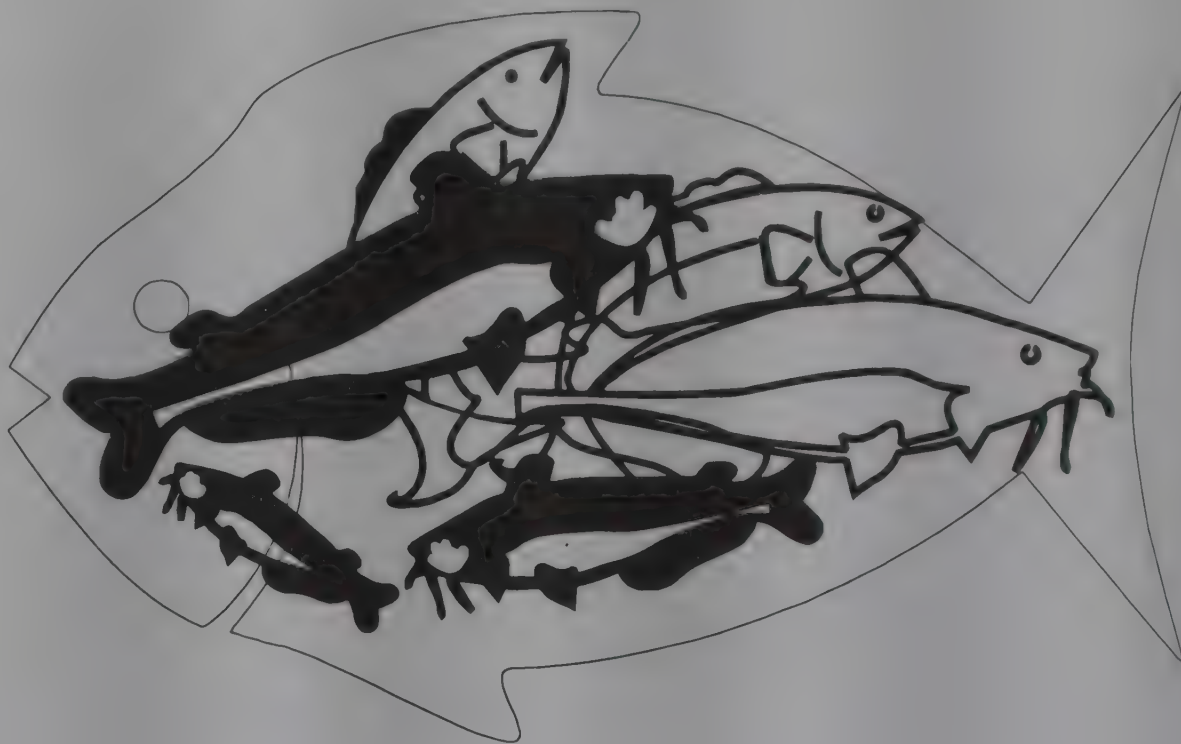
Household consumption of sugar rose by 15 percent, but purchases a year ago were low and compared with the first quarters of the previous couple of years the amount purchases in 2001 was lower.

The price of fresh potatoes was 41 percent higher in the first quarter of 2001 compared with the same quarter last year and higher than in the first quarter of other recent years - apart from 1999.

This showed in consumption in the home, which was 7 percent lower than last year and the lowest first quarter on record.

The price of fresh vegetables - excluding potatoes - was also high - 5 percent up on last year - and consumption down by 4 percent to its lowest first quarter level for 10 years.

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What can you do when the mercury rises?

Your customers look to you for answers about negative press on seafood

Michael Bavota

Consumers are constantly bombarded with sound bites delivering gloom and doom, fear and frustration, tragedy and despair. This is called the daily news, the stuff from which headlines are made. And sometimes these poison arrows land right in the middle of your seafood operation—with a resounding “thud.”

In the media recently has been the FDA's advisory to pregnant women, women of child-bearing age, nursing mothers and young children against eating swordfish, shark, king mackerel or tilefish because of their methyl mercury content. This advisory obviously affects the buying patterns of the target group.

When one of these customers approaches your seafood counter and says, “I can't eat swordfish, tuna or shark because they say it is bad for you,” what should you do?

Use it as a sales opportunity. Start by being honest with the customer. You needn't challenge the FDA's advisory; simply acknowledge the information and suggest the customer consider another type of fish.

You can also urge consumers to check other sources for seafood information. Explain that the FDA is the regulatory authority for seafood in the United States and that the Centers for Disease Control and Prevention issue warnings about food-borne illnesses and recalls.

The FDA has determined that methylmercury levels for most fish

range from less than 0.01 parts per million to 0.5 ppm. It's only in a few species of fish that levels reach the FDA's 1 ppm limit for human consumption.

This most frequently occurs in certain large predatory fish, such as shark and swordfish and certain species of very large tuna.

The Environmental Protection Agency Web site offers good information as well. It says that fish is an excellent source of nutrition and notes that most people have no reason to limit fish consumption. However, the developing nervous systems of babies and young children are more sensitive to methylmercury's harmful effects than the more fully developed nervous systems of older children and adults. As such, women who are pregnant or may become pregnant, nursing mothers and young children are advised by the EPA to limit their consumption of recreationally caught freshwater fish to one meal per week. Other family members do not need to follow this advice.

This kind of information is unlikely to make the news but should be available to your customers so they can make their own decisions about eating fish.

You can also give phone numbers for the FDA and EPA to customers who desire more information about methylmercury in fish or have other seafood concerns. Have them call the 24-hour FDA Seafood Hotline or Jeff

Bigler at the EPA.

Environmental issues

Consumers also approach seafood retailers with concerns about overfishing and sustainability: “I hear all the oceans are overfished. If I buy seafood, am I not contributing to the problem?”

Your customers need a short and simple answer to this loaded question. Tell them that fishery management agencies are charged with preventing overfishing. If possible, tell them a fisheries management success story, like the one about the scallop fishery off the Grand Banks.

Suggest a visit to the Ocean Trust or National Fisheries Institute Web sites, or NFI's new consumer site, aboutseafood.com. All have fact sheets pertaining to fisheries issues.

If your store is in a state that has a fishery council or marketing board, like Florida, North Carolina, New York or Virginia, make that agency's contact information available to the questioning customer.

The only people who can give consumers the good news about seafood are those on the frontline - you and your staff.

So be sure to do your homework and share your information sources with your customers.

Michael Bavota is seafood director for Program Sales & Marketing in Tampa, Fla. He can be e-mailed at mbavota@divcom.com

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HACCP Auditor / Lead Auditor Training on Food Safety Management Systems

MPEDA has been playing a lead role in implementation of HACCP, the latest quality assurance system accepted world wide, in the Indian seafood industry. During the past, a number of training programmes on the basics of HACCP and a few training programmes on audit and verification have been conducted at various centers.

Here is yet another stride of MPEDA for HACCP implementation with professionals. The present programmes are two 5-day training programmes on "HACCP Auditor/Lead auditor training on food safety Management Systems" at Cochin and Chennai exclusively for the technologists of seafood industry. This HACCP Auditor/Lead Auditor training on food safety management systems is being organized by MPEDA with the professional expertise of M/s. Quality Assurance Services (QAS), Australia.

The QAS is a professional certification body established in Australia in 1991 in the private sector. It offers premier third party certification programme, supported by education and training services. In addition to the training / education programmes in Food Safety Management Systems, the QAS has certified several companies under the ISO certification.

The participants who successfully complete the course will be certified as Food Safety Auditor by QAS, Australia.

Completed applications with Demand Draft/Cash should reach Dr. J. Bojan, Joint Director, MPEDA/or the Dy. Directors of the Regional Offices of MPEDA in or before 15th of July 2001.

Following are other aspects/features of the proposed training:

Place : Cochin and / or Chennai
(subject to availability of candidates)

Duration : 5 days
No. of candidates (seats) in each programme 9 only per programme

Date of training : Any time during July / August / Nov 2001
(will be finalized shortly)

Eligibility for participation : Members of in-house HACCP team/practitioners who are undertaking or likely to undertake auditing & verification.

Fee payable per candidate at subsidized rate : Rs.15,000/-
(The total cost for training per candidate is estimated as Rs.30,000 and MPEDA will be contributing the balance amount.)

The fee includes the training fee, costs of course materials, certification and lunch & tea for 5 days.

Interested companies may sponsor their nominee in the prescribed application form along with the fee of Rs.15,000/- drawn in the form of DD in favour of MPEDA, Cochin.

In the event of getting excess or insufficient candidates at either of the places, the candidates sponsored are liable to attend the programme either at Cochin or Chennai.

Though first-come-first served will be the criteria for selection, MPEDA reserves the right to accept or reject any application.

AQUACULTURE

FEAP PLANS COUNTER-ATTACK IN MEDIA WAR

European fish farmers plan to launch a major initiative in August designed to counter media assaults on the industry.

The project is the result of discussions between the Federation of European Aquaculture Producers (FEAP) and major industry players. Funded by the private sector, it will prepare and release aquaculture information using the Internet, multimedia CDs, newsletters and brochures, in a "co-ordinated response" on the sector.

According to a statement, the information will be targetted at the general public, the education sector, government and related institutions, media, and consumer and special groups. It will seek to give correct information on all areas of the sector, and "not avoid sensitive areas where criticism has been raised". The first presentation is expected to be the August AquaNor conference, in Trondheim.

There will be a core 'news' section on legislative, technical and production issues, offering the latest updates on developments and initiatives, and interactive and video/slide sections for recipes, while consumer interests will be answered through nutritional facts and figures. Farmers, suppliers and aquaculture associations will be able to obtain single language CD-ROMS, for national distribution and promotion.

The statement promises "sectoral transparency and proven facts" as

contd. on Page 17



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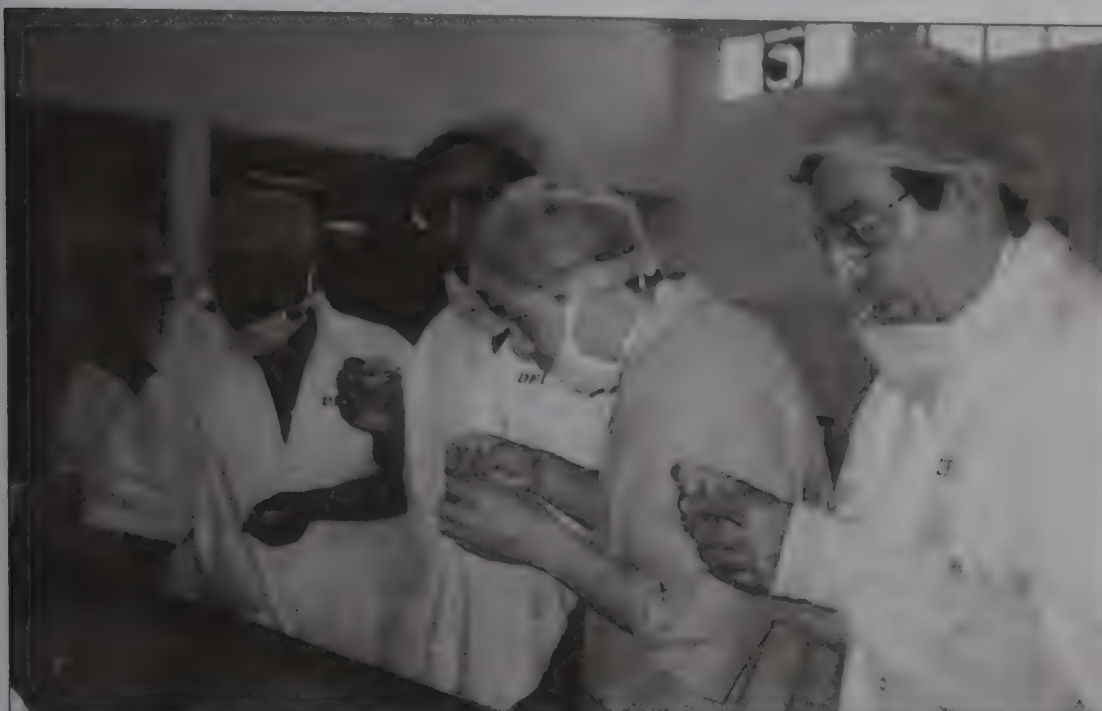
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Japanese importers visits Indian factories

contd. from Page 15

A team of officials of the Japan Seafood importers Association visited India recently. The team had discussions with Ms. Sashi Sareen, Director EIC and other officials of MPEDA and SEAI. The team also visited M/s. Devi Seafoods Limited.



Team visiting the factory



Discussions in progress



AQUACULTURE

opposed to what it calls "conjecture rather than substantiated fact... correct and proactive information that is interesting whilst promoting and supporting the whole of the sector - producers, suppliers and researchers."

Initially production information will focus on European activities, giving data on species being produced in marine and freshwater sectors, profiles on biology and lifecycles, and eventually national profiles, with information on farms that encourage visits, tourism and sport fishing opportunities, while "producers and players in the sector will be encouraged to present themselves through 'Aqua-media'."

In an attempt to refute environmental criticisms which have dogged the sector, the project will "provide factual data demonstrating aquaculture can exist in harmony with nature, including cited references to its interactions with the environment. The development of objective arguments and a reliable information stream, paying attention to sectoral transparency and proven facts, will be an important part of the initiative." Reports on specific subjects will be sourced, and articles commissioned on selected topics.

FEAP President Alessandro Perolo described it as the "most important project FEAP has ever been involved in and we are delighted to have obtained the support of so many parts of the aquaculture sector. It is our intention that Aqua-media will be the authoritative information resource for use by consumers and others who are interested in how we operate."

(source: Intrafish)

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Development in fish processing technology and export potential for fish and fishery products

R. Jeya Shakila, G. Jeyasekaran and Y. Sundararaj*

The top ten fish/shrimp producing countries are from the Asian region, which is the centre of fishing and aquaculture activities. In India, more than 6 million fishermen and fish farmers are engaged in fishing and aquaculture industries for their livelihood. Most of them are small scale farmers and fishermen. Therefore, our strategy to enhance the export of fish and fishery products, will certainly pay a rich dividend to the rural fishermen, fish farmers and our country as a whole.

Export Scenario

The value of marine products exported from India substantially increased from Rs. 25 million in 1950-51 to Rs. 5,096 crores in 1999-2000. The industry contributes 4% to India's foreign exchange earnings in 1990's, which was just 0.5% in the early 1950's. Frozen shrimp, fish, cuttlefish and squids constitute the major items of export (Table 1). The contribution to export by these items is only 14.4% of the total marine production, but they constitute 74% of the total value of the landings.

The quantity of marine products exported from India increased by about 20 times from 19,650 tons in 1950-51 to 3,40,003 tons in 1999-2000. The growth in export has been phenomenal, com-

pared to the increase in the marine fish production. This substantial growth in export is mainly due to three reasons. Firstly, there has been a steady increase in the marine fish production from 0.5 million tons in 1950-51 to 5.27 million tons in 1999-2000 due to modernization of fishing fleet and discovery of rich shrimp fishing grounds. In addition, the cultured shrimp production has enormously increased from 1990, and their export has reached to 1,09,868 tons valued Rs. 3,638 crores in 1999-2000. Secondly, there was a shift in the export market and products. For instance, India did not export marine products to Japan in 1940's, but now 44% of the products are exported to Japan, and also, there is a growing demand for Indian marine products from South East Asian and Gulf countries. Thirdly, a part of the production used for the domestic consumption is now diverted for export with the increased export of ribbon fishes, threadfin breams, mackerels and carps.

High Valued Products

There has been a shift in the export of high valued fish and fish products from the low valued products. For instance, the export of high valued shrimps and cephalopods increased

enormously, while export of finfishes has decreased. The pattern of export also shifted from dried and salted products, to canned and later to frozen/live organisms. The value of dried and salted products were 85% in 1950-51, which had declined to a negligible quantity (2%) in 1999-2000. Canned products dominated the export market in 1950's and frozen products from the late 1960's. With increasing demand for frozen products, more freezing plants were installed in the 1960's. The freezing and storage capacities attained today is 8,435 tons/day and 1,08,065 tons/day, respectively in the country. Therefore, 99% of the export value is realised from the frozen products.

Value Added Products

There is a changing phase in the consumer preference and cooked products have started replacing the raw products. Introduction of microwave oven has brought in a revolutionary change in processing and packing of fishery products in ready-to-eat convenient packs. Imitation products prepared partly with fish and partly with other products replace expensive gourmet dish. However, India is still remaining a supplier of raw material to the developed countries. The MPEDA should continue giving promotional programmes for value addition to achieve the described results. When our exporter gets into the process of value addition, resistance builds up in importing countries. They then discourage the export of value added products through tariff and non-tariff barriers, which again cause a lot of image building exercise.

In India, attempts have been made to pack the products in the established brand of a supermarkets in Japan, EU and USA, but our exporters are not getting the price, brand image and recognition. Supermarkets also demand supply and serving of seafoods at

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short notice. To satisfy the requirements of supermarkets, warehousing and blocking of capital are required, which again add to the cost. To overcome these difficulties, the following strategies are recommended. (1) Central Government should introduce the latest technology to process value added products (2) EEC should set up warehousing for frozen seafoods, to centralize marketing of value added products. Interested exporters can then avail this facility to overcome the initial hurdles (3) A large group of exporters should step into this new venture. According to the supermarkets, the value added products should be pooled from India and made available in the warehouse in appropriate quality and quantity.

Live Fishes

There is a persistent demand for some of the live fishery resources such as shrimps, lobsters, crabs, sea cucumbers, sea snails (abalones), bivalves (oysters, scallops), finfishes (groupers, eels, snappers, sea breams, sea bass and ornamental fishes) and fresh water turtle from Japan, Korea, China, Taiwan, Europe and USA. They fetch very high price, when compared to frozen fish. For instance, the frozen lobster fetch Rs. 370/kg, while live ones Rs. 1,000/kg. India's export of live marine products stood at 1,676 tons worth Rs. 380 million in 1999-2000. The major items of live fish export are the mud crabs, spiny lobsters and reef fishes. Fattening of juvenile crab and lobsters for live export would increase the financial returns. Research Institutions should play a key role to develop suitable techniques for exporting live fishes.

Andaman and Nicobar islands have enormous export potential for the live marine products at a close proximity to Singapore, from where very good air service is available to any destination in the World. India should set up a very strong base for sea-farming and export

of live marine products. Port Blair, Chennai and Mumbai can emerge as the major ports for export of live marine products, which can increase the export to atleast 10 times the present level.

Preprocessing Plants

There are about 561 peeling sheds and 402 preprocessing units in India. Peeling is a house-hold activity of the fisherfolk and hence required hygiene for handling the perishable commodity is not met. Consequently, incidence of pathogenic bacteria, *Salmonella*, *Vibrio cholerae*, *E.coli*, *Staphylococcus aureus* and others are reported on the export

Peeling is a house-hold activity of the fisherfolk and hence required hygiene for handling the perishable commodity is not met. Consequently, incidence of pathogenic bacteria, *Salmonella*, *Vibrio cholerae*, *E.coli*, *Staphylococcus aureus* and others are reported on the export consignments

consignments. Therefore, the preprocessing units need to be upgraded by installing modern hygiene units, preferably close to the landing centres.

Processing Plants

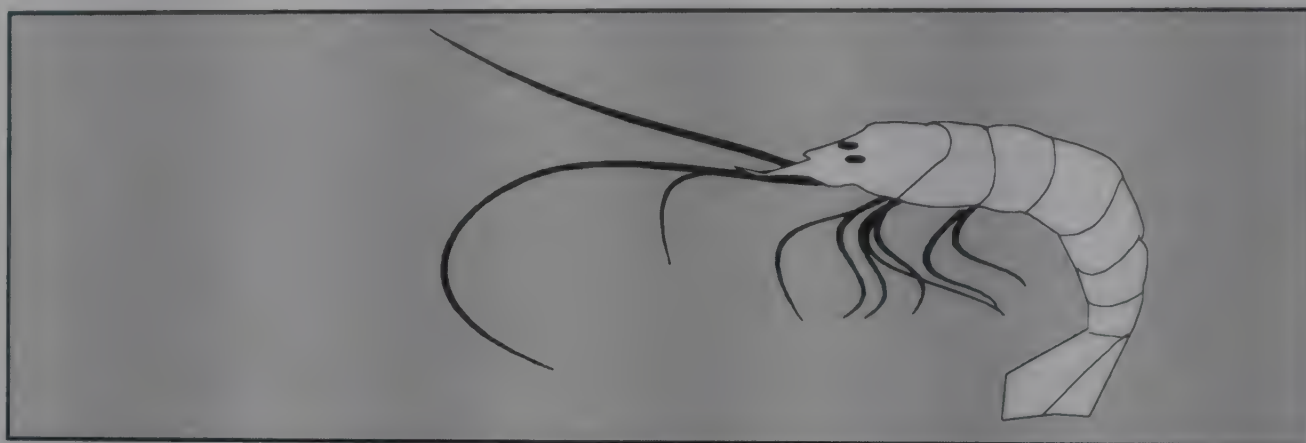
In India, there are about 402 seafood processing units registered with MPEDA, out of which 100 are having IQF facility and 7 plants are processing value added products. All processing units are located all along the coastal States, and 85% of them are small scale operations. These units are located in 20 major coastal places and the locations are Veraval, Porbander, Mumbai,

Ratnagiri, Goa, Mangalore, Calicut, Kochi, Kollam, Thoothukkudi, Mandapam, Chennai, Nellore, Kakinada, Bhimavaram, Vizag, Bhubaneswar, Paradeep, Puri and Calcutta (Table 2).

The total freezing capacity of these plants is 8,435 metric tons/day, but the current production is only 1,050 metric tons/day (Table 3). Consequently, the industries capacity utilization in relation to the installed capacity is 14%. The entire production of the units are for export. The marine catch, which still forms bulk of the raw material supply is spread over almost 1,500 landing centres, of which 45 are fishing harbours. Sanitation at these landing centres is extremely poor. Of the 402 seafood processing units, about 150 plants have got the approval of the supervisory auditing and interdepartmental panel of Export Inspection Agency (EIA). MPEDA provides financial assistance to the seafood processors to modernize their units, but only 50% of the processors have availed this facility. The processors should realize and have the aptitude to update their units with modern machineries and follow international standards of hygiene.

Further, the processors have to comply with the standards set by USFDA and EU to export seafood. However, Japan, China and other Asian countries have not come out with such regulations, leaving our processors to survive in the trade. Indian exports reach USA and EU through a third country. Thailand, Indonesia and Malaysia are exploiting this situation. The above problems can be solved to a large extent, if the basic infrastructure facilities are improved and fishermen are educated on quality conscience. The suggested strategies for the development are (1) Quality upgradation from on-board preservation of fish catch and on-shore landing. All landing centres require basic hygiene and infrastructure facilities such as landing platform, ice plant, cold stor-

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age, potable water, toilets etc. according to the member of fishing vessels and quantum of fish landing (2) Processors should introduce an ritual quality check and accordingly fix the price (3) Mixing bad and good quality material in the basket should not be entertained (4) A cheap and simple quality check meter should be introduced to identify and sort out the substandards material.

A Transportation

The fish landing centres, pre-processing centres, processing centres and ports of shipment are to be linked with proper 'cold chain'. But, according to a survey by the MPEDA, 60% of the fish catch is still transported through bicycle and head load for want of road. Fish catches from far off places are transported in baskets in uninsulated wagon of our railways. This does not allow the required standard of quality. There are about 1000 insulated and refrigerated trucks to transport raw materials and finishes products, which are not adequate.

The following steps need to be taken to promote the fish export potential of our country:

1. Central Government should form an independent Ministry for Fisheries to bring all research and marketing under one head.

Table 1. Export of major items of fishery products from India during 1999-2000

Items	Quantity (in tons)	Value (in Rs. crores)
Frozen shrimp	1,09,868	3,635
Frozen finfish	1,29,679	538
Frozen cuttlefish	32,538	284
Frozen squid	34,648	293
Dried items	6,136	43
Live items	1,679	38
Chilled items	3,088	45
Others	22,378	225
Total	3,40,003	5,096

Table 2. State-wise break up of the seafood processing units in the year 1999-2000

S. No.	Name of the State	Number of units
1.	Gujarat	56
2.	Maharashtra	41
3.	Goa	7
4.	Karnataka	14
5.	Kerala	124
6.	Tamil Nadu	48
7.	Andra Pradesh	55
8.	Orissa	21
9.	West Bengal	36
Total		402

2. Active participation of private sector is essential and infrastructure required for development should be set up by both government and private sector.
3. Scientists and faculty employed in research institutions, Universities

and MPEDA should provide training to fishermen to enhance their skill and inculcate in them the desired hygiene in handling fishes.

4. Research centres in fisheries/aquaculture should be supported to develop, require test, demonstrate and disseminate the latest technology to fishermen and fish farmers.
5. Tax holidays for 5 years should be extended for (a) introduction of latest technology in fisheries, aquaculture and processing for value addition (b) investment or creation of 'cold chain' for quality improvement and creation of new facilities for export (c) investment on modernization of processing plants.

Table 3. Infrastructure for the registered units of seafood processing industry in the year 1999-2000

Category	Number	Capacity/day
Exporters	1,443	-
Fishing vessels	14,113	-
Freezing plants	418	8,435
Canning plants	13	570
Ice plants	162	3,065
Fish meal plant	12	229
Shrimp peeling units	561	33
Conveyances	498	-
Cold storages	476	1,08,065
Agar agar plant	1	-
Isinglass	1	-
Other storages	216	11,233

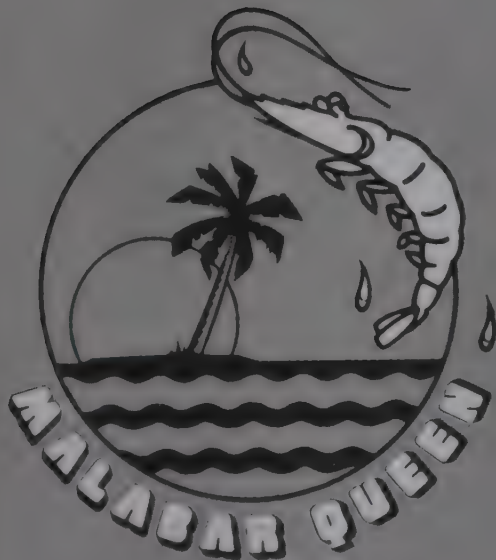
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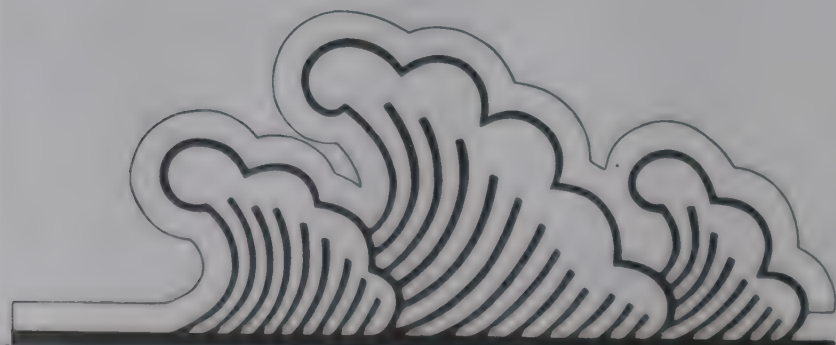
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E-commerce

Business-to-business consortiums drive and define e-commerce value

Liss Duchene

E-commerce in the seafood industry began last year as a blitz but has slowed to a methodical search for value. Technology companies that rushed to market and spent millions launching seafood exchanges have been forced to answer a fundamental question of the old economy: What has value?

The answer is efficiency. When the technology proves that seafood companies can save money and can increase their profit margins, then e-commerce will take hold in the industry.

"If you think of e-commerce as playing with a computer and browser, you don't get it," says Mike Sexton, director of e-business marketing for Sysco Corp., the biggest seafood distributor in the United States with seafood sales topping \$1 billion.

"We're talking about moving major amounts of information around quickly. What we want are real-time order to come in cleanly and move through our system, ultimately creating electronic funds transfers. We don't want to have to deal with paper and faxes."

Technology companies paint an idyllic picture of seamless transactions, increased efficiency and use of e-commerce's inventory-planning systems to reduce excess inventory and predict demand, taking some of the volatility out of the market.

E-commerce analysts say electronic processing of invoices will cut the cost from \$100 to \$10 per invoice. The Gartner Group research firm predicts global e-commerce volume will reach \$6 trillion by 2004.

Mike Bush, seafood account manager for Global Food Exchange, envisions that e-commerce systems will allow all the "islands of information" in an operation to come together, effectively speaking with each other.

He also sees a time when e-commerce is as interconnected as the phone system. We all use different cellular phones and long-distance carriers, but we can all talk to each other, he notes.

"The exchange technology was easier to build," says Bush. "Linking the whole thing together is a pretty daunting task. It's not 100 per cent done, but the systems are getting better."

Even though technology is expanding the realm of online exchanges, there is still a lot of resistance to e-commerce in the seafood industry.

"It's dead," says the president of a Northwest processing company about e-commerce.

The current product exchange platforms make selling less efficient. Since every sale requires a phone call, e-commerce now means a double system, he adds.

Many seafood companies have taken a wait-and-see attitude to e-commerce and are watching their customers for a sign that the technology has become a must-do.

Other companies, like distributor Pacific Seafood Group in Portland, Ore., are starting to see the value in online exchanges. The company began using the Freshnex exchange more than a year ago, and is now seeing about \$30,000 in seafood sales to foodservice customers each week through the exchange.

Freshnex matches retail buyers and chefs looking for ultra-fresh, often organic, perishables direct from the supplier, delivered overnight via Federal Express.

Popular items like salmon, halibut, prawns, oysters, clams and Chilean sea bass sell the best, says Jonathan Brandt, the company's national sales manager.

Freshnex has helped Pacific target new customers, says Brandt. Pacific continues to draw five new customers a week via the site.

One drawback is that the online system doesn't talk to Pacific Sea-

Technology companies paint an idyllic picture of seamless transactions, increased efficiency and use of e-commerce's inventory-planning systems to reduce excess inventory and predict demand, taking some of the volatility out of the market.



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food's existing back-end computer system. That means entering information the old and the new way for now - not so efficient.

But technology companies want to change that. The next e-commerce blitz you'll hear from them is about back-end integration an online ordering system that dove-tails into a company's existing accounting, inventory and invoicing systems.

"Everybody's always known (back-end integration) was something that was important," says Tim Clark, a senior analyst with Jupiter Research. "But it sort of really got driven home by these industry-sponsored market places."

Such marketplaces-often alliances of companies representing big buying power-are shaping and defining value in e-commerce, says Clark.

Meanwhile, technology companies themselves are consolidating and working toward defining the common computer language that will allow online market places to speak to each other and companies' internal systems."

To that end, Integrated Seafood Solutions, a new company in Franklin, Mass., formed by President Steven Horton, is working to create an industry catalog of 8,230 standard seafood product names, descriptions and codes. ISS hopes to have the catalog approved by UCC-Net, an organization leading a global effort to establish product standards in many industries. ISS plans to manage the catalog and sell access to it to the seafood industry.

The electronic Foodservice Network, a b-to-b marketplace formed by Sysco, McDonald's, Cargill and Tyson, is creating similar standards for the foodservice industry.

"What we're trying to do is create some standards on electronic commerce

in this industry," says Sysco's Sexton. "What we're really interested in doing is bringing orders from our suppliers into the back-end of our system without having to use faxes. We're very interested in bringing all of our suppliers into this system and hope it's flexible enough to work into their systems. We're not interested in changing everybody's systems."

Sexton predicts it will take some time for the system to gain traction but thinks that in three to five years, 60 to 80 per cent of Sysco's suppliers will be using it.

The Seafood Alliance, a consortium of seafood companies representing almost \$5 billion in seafood sales, is another example of how industry-sponsored marketplaces are defining value in e-commerce.

The member companies, including High Liner Foods, Clearwater Fine Foods and Trident, joined to determine how e-commerce could help their bottom lines. They elected to partner with Gofish.com and pool their buying power for saving

on everything from copy paper to telephone service.

Scott Allmendinger, chief sales and marketing officer at Gofish.com, estimates the average savings on indirect purchase to be 7 per cent and predicts aggregate savings for all Gofish members will be \$140 billion.

Retail alliances are also driving e-commerce adoption. The World-Wide Retail Exchange, a b-to-b exchange for the retail industry, represents 53 retailers from all over the world with combined sales of \$722 billion. Member companies include Albertson's, H.E. Butt, Wegman's, Kmart and Target.

WWRE just announced a strategic alliance with Agribuys to provide e-procurement of perishables including seafood.

As consortiums representing billions of dollars in purchasing power define value, and technology companies deliver back-end integration, more companies will see the value of e-commerce.

SCHEME FOR DISTRIBUTION OF INSULATED FISH BOXES ON SUBSIDISED COST

The Marine Products Export Development Authority has decided to enhance the value-wise ceiling of subsidy for insulated fish boxes purchased after 5/5/2001, as detailed below:

Category/beneficiary	Maximum subsidy (Rs.)
Small mechanised boat / country craft (less than 32 ft. OAL)	4,500
Mechanised boat	15,000
Peeling shed/pre-processing centre	50,000
Processing plant	1,00,000
Shrimp farmers 5 ha. and less	35,000
Shrimp farmers above 5 ha.	50,000

It may please be noted that the above enhancement on value-wise ceiling will be applicable only to insulated fish boxes purchased after 5/5/2001.

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National Seminar on RIVERINE AND RESERVOIR FISHERIES CHALLENGES AND STRATEGIES

An inland fishery is a source of food and provides employment and economic benefits to large sections of the society in India, particularly among the economically weaker segments.

Inland fish production in India increased from 0.22 million t in 1950-51 to 2.8 million t in 1999-2000 making India the second largest producer of inland fish, next only to China. The fresh water resources of India include 29,000 km length of main rivers and important tributaries, 2.09 million ha. of lakes and reservoirs, about 1.30 million ha of beels, jheels and derelict water bodies, 0.12 million km of canals and channel network, 2.25 million ha of ponds and tanks and another 2.3 million ha of water logged paddy fields. At present about 78 % of the inland fish produced in India (2.18 million t) is derived from aquaculture and 22 % from capture fisheries (0.62 million t). About 200 species constitute the native ichthyofauna of which more than 100 are of significant commercial importance. About 0.45 million fishermen depend upon inland fisheries for their sustenance. Targeted fish production from the inland sector is about 8 million t by 2020 AD, in order to maintain the per capita consumption at the current levels.

Considering the importance of inland fishery resources in the food se-



Mr. N.V. Madhavan, Principal Secretary Govt. of Kerala, inaugurating the Seminar

curity, and economy and well being of the fishermen, Society of the Fisheries Technologists (India) and Central Institute of Fisheries Technology have jointly organised this Seminar, to highlight the present constraints in the development of inland fisheries and to evolve new strategies for the advancement and utilisation of this sector, at sustainable levels. The seminar was inaugurated by Shri N.V. Madhavan, Principal Secretary, Govt. of Kerala. Dr S.T. Gopakumar, Deputy Director General (Fy), ICAR presided over the function. Mr. T. Thankappan IAS, Director of Fisheries, Govt. of Kerala and Mr. Joseph Edward, M/s India Sea foods, Cochin offered felicitations. Dr K. Devadasan, Director, CIFT welcomed the gathering and Dr P.T. Mathew,

Secretary, SOFT(I) proposed vote of thanks.

The objectives of the Seminar were

- to take a look at the recent developments in the inland fisheries of India;
- to review, consolidate and document the available scientific information on inland resource systems, their harvesting, utilisation and management; and
- to evolve suitable strategies for the development of inland fishery resources, on scientific lines, leading to renewed growth of this vital sector.

The inland fishery resources are facing threats on account of unscien-

tific application of technological advancements. Besides this, inland fisheries, especially reservoir fisheries, are being gradually destroyed by deforestation leading to soil erosion and silting, industrial pollution and pressures of urbanisation. Constructions of dams for irrigation and power generation are also affecting the inland fishery resources. Focusing attention on the all round development, and evolving better policies and guidelines for the scientific development are the needs of the hour. Crude harvesting methods like use of under-water explosives, poisons etc for indiscriminate killing of

in this sector is underutilized. Our aim today must be to utilise this wealth for development of value added products for the domestic as well as international markets.

The seminar was organised into five Sessions.

Technical Session-1 Ecology: Twelve papers dealing with aspects such as limonoligical status, ecology, environmental degradation, siltation and pollution, were presented and the Session was chaired by Dr. N.R. Menon, Director, School of Marine Sciences.

Technical Session-2 Resources. Ten

techniques

Technical Session- 4 Post Harvest Technology, chaired by Dr. K. Gopakumar, DDG (Fy), ICAR, and Dr. M.K. Mukundan, Head, QAM, CIFT, covered 12 papers dealing with processing techniques, biochemical, microbiological aspects, value addition, and quality control in respect of fresh water fishes.

Technical Session-5 Fisheries Extension and Management, chaired by Dr. D.M. Thampy, Dean, College of Fisheries, Panangad, covered 16 papers, dealing with strategies for extension, training, management and marketing, for the development fresh-water fisheries.

During the 5 Sessions, deliberations have been made on the views, experiences, results and suggestions put forward by the delegates. Recommendations were finalised in the Plenary Session chaired by Dr. K. Devadasan, Chairman, Organising Committee and Director CIFT.

These recommendations were emanated from the scientific papers presented and deliberations and discussions took place during the seminar.

Recommendations:

1. Development of a consensus National Code of Conduct for Responsible Fisheries with special reference to inland resources involving all stake holders, need to be taken up on priority basis. The Code will give guidelines and standards of behaviour for the conservation and utilisation of inland water resource systems, on a long-term sustainable basis.
2. Inland resource systems have multi-purpose nature of use patterns and 'major impacts and conflicts often arise from activities other than fisheries. This means



Dr. K. Gopakumar, DDGC(Fy) delivering the presidential address

fishes should be legally prevented. Only scientific fishing gear and methods should be allowed for fishing in rivers and reservoirs. Fishing has to be banned during the breeding season to conserve the fishery resources. The fishermen have to be educated about the rules and regulations to be followed for the sustainability of the system.

On the post harvest side, major problems in freshwater fishes are lack of facilities for transportation, insufficient processing facilities and absence of dependable markets for processed products. Because of this, the fishery

papers dealing with the status of inland fish production, ornamental fisheries, biology and distribution of fresh water fishes and approaches for their enhancement, were presented in this Session chaired by Dr. P.V. Dehadrai, former DDG(Fy), ICAR.

Technical Session - 3 Culture and Capture Techniques, chaired by Dr D.S. Sheshappa, Professor, College of Fisheries, covered 14 papers dealing with different aspects of culture and capture practices, recreational fishing ornamental fish production, and harvesting



Dr. N.R. Menon, Director, School of Marine Sciences chairing session 'Ecology'

that a careful impact analysis should be mandatory for all non-fishery projects based on inland aquatic resources.

3. Development of comprehensive searchable database on the inland water resources, their fishery, ecological and productivity parameters is an immediate necessity for the management of inland fishery resources.
4. Revalidation of the physical inventory of inland water resources in different States of India, was recognised as an essential requirement for development of this sector.
5. Available inland water resources in different states are not fully utilized for culture-based and/or enhanced fisheries. There is need to orchestrate the optimal use of inland water resources, to reduce supply-demand gap, by increasing fish production.
6. Revalidation of production figures from freshwater resource systems, need to be taken with priority, for the purposes of resource management and planning.
7. India has an abundance of germ-plasm resources in its aquatic resource systems. However, several

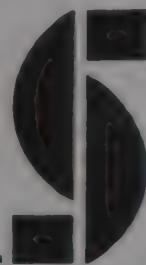
endangered and vulnerable germ-plasm resources are identified from different ecosystems, of late. In situ and exsitu management measures are needed to protect the ichthyobiodiversity in inland waters.

8. India is blessed with 3.2 million ha of small, medium and large reservoirs. The average yield from these reservoirs is only 20 kg.ha⁻¹.yr⁻¹. There is agreement among experts that production from reservoirs could be increased to 50 kg.ha.yr or more, with scientific management and fishery enhancement programs. Reservoir fisheries need to be recognised as a thrust area for development.

9. Greater focus need to be given for reservoir fishery management based on a ecosystem approach.
10. Cage culture in reservoirs and other freshwater bodies need to be pursued with greater vigor.
11. Introduction of palaemonid prawns (*Macrobrachium* spp.) in reservoirs could increase production, besides adding an attractive export component to the reservoir fisheries economics.
12. Development of post-harvest technologies, value addition and effi-

cient marketing strategies could give' major fillip to the inland fisheries development. Comparatively low price realized by freshwater fishes and a very weak marketing strategy are recognised as major constraints for the development of this sector.

13. Dams and barrages have been long known to cause physical obstruction to migratory fishes resulting in physiological stress and breeding failures. Inadequate planning before impoundment also leads to difficulties in harvesting of fishery resources, later. Pre-impoundment surveys and Environmental Impact Analysis need to be made mandatory for any project based on inland water resources.
14. Anthropological interventions in Riverine and reservoir water bodies have resulted in many deleterious changes in aquatic fauna and flora. While some of these have to co-exist with the developmental activities, remedial measures in the form of artificial habitats for breeding of fish and shellfish can mitigate these changes to some extent.
15. Anthropological interventions have resulted in elevated levels of pathogenic micro-flora in water, sediment and fish. Some of these microflora are also resistant to antibiotics. Newer and radical methods of preventing this contamination are the need of the hour.
16. The Geographical information System (GIS) coupled with satellite imaging techniques can be a powerful management tool for macromanagement of riverine and reservoir resources.
17. Selective and environmentally safe fishing gear and practices should



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be further developed and utilized in order to achieve objectives of maintenance of biodiversity, long-term sustainable production and protection of aquatic environment.

18. Trade in ornamental fishes is recognised as an emerging area with a very high export potential, estimated at US\$ 30 million. At current levels, export earnings is only US\$ 0.39 million. Adequate impetus needs to be given for development and promotion of trade of ornamental fishes, on a sustainable basis.
19. India have several indigenous freshwater fishes with potential for promotion in ornamental fish Grade. Captive breeding of potential indigenous ornamental fishes is an important area for development.
20. Management of reservoirs by fishermen co-operatives needs to be promoted, on an experimental basis, in order to increase efficiency of stocking, production and marketing under Governmental supervision.
21. Quality criteria for aquaculture systems and products, need to be developed on priority basis.
22. A Geographical Information System needs to be developed based on the incidence of biotoxins from algae, fish and shellfish of inland waters.
23. Popularization of freshwater fish, needed to be taken up, to increase per capita consumption.
24. A national project on development of genetically engineered beneficial species, value addition and quality assurance packages, need to be drawn up.
25. Suitable feed formulations to ensure better growth efficiency, quality and safety of the end product,



Dr. D.N. Singh, CICFRI

- need to be further developed.
26. The use of indigenous packaging materials for value added products, need to be promoted increasingly.
27. A strategy for improving the quality and marketability of smoked and cured freshwater fish products in different parts of the country, need to be developed.
28. There is need for the identification of Potential Fishing Areas (PFA) in reservoirs; remote sensing and application of hydro-acoustics may find extensive use in this field.
29. Appropriate capture techniques such as trawling need to be developed for the removal of undesirable fish species in the reservoirs.
30. Since the riverine and reservoir systems are controlled by various Govt. bodies, and presently do not have a uniform policy with regard to fisheries, any fisheries projects proposed in such regions shall be jointly looked into by a Committee having the member representatives from various departments. A policy may be evolved in this regard by the Govt.
31. Training and education of the stake holders with regard to implementation of new regulations and responsible methods of fish harvesting, handling, processing, marketing and utilization in order to attain the objectives of sustainable protection, protection of biodiversity and environmental safety, need to be implemented.
32. Sanctuaries for endangered species need to be established and measures developed to rear them in captivity for fishery enhancement.
33. Practices for proper water, pond and culture management in the aquaculture system for increased and sustained production, need to be implemented.
34. Cage culture and ranching which is found successful in the case of Mahseers may be adopted in other reservoirs and also tried with other species.
35. Inland fisheries Extension should be strengthened by adopting non-conventional strategies that was successful in other fields such as cyber extension and precision farming, including participatory approach.
36. Fisheries professionals should have more involvement in social fisheries (fishermen, local bodies and NGOs) in the development of inland fisheries.

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SHRIMP 2001



**Fourth World Conference on the
Shrimp Industry and Trade & Buyer-Seller Meet
27-29 September 2001, Chennai, India**

SHRIMP 2001, the world conference on shrimp industry and trade, the fourth in the series, is hosted by India in Chennai. Launched in 1988 (SHRIMP '88) in Bangkok, the second and third INFOFISH shrimp conference were held in Kuala Lumpur (1990) and Hong Kong (1992). Shrimp 2001 is the 16th international fishery commodity conference organised by INFOFISH in various locations of fishery importance.

The global shrimp trade in the first year of the millennium witnessed certain interesting developments, such as:

- US shrimp imports expanded further in 2000 despite the economic slowdown towards the end of the year. On the wave of record imports and high domestic production, the apparent consumption of shrimp also increased.
- European shrimp market strengthened in the closing months of 2000. Improved economic conditions, foot and mouth disease and mad cow problem fuelled demand and high consumption of shrimp at the food service level.
- Japanese market slowed down due to the influence of negative factors such as fluctuation of the Yen, economic uncertainty, combined with large inventories and low demand from households.
- Many supplying countries in Latin America faced disease problems but it was a year of high production for Asian shrimp farmers.

- New markets have emerged in Asia eg. Republic of Korea, Singapore, Hong Kong etc.

Taking stock of these and other issues and developments, SHRIMP 2001 will attempt to examine and assess the future of the industry through a comprehensive programme examining:

- Global resources, supply situation and outlook (capture and culture)
- Major markets and market trends
- Technological developments: products, value addition, quality assurance
- Developments in aquaculture
- Conservation, environment and trade issues
- Investment opportunities
- Buyer-seller meet (business session) and technical session

INDIA, the host country to SHIMP 2001, is the world's largest producer of wild caught shrimp. Having an extensive coastline with hundreds of fish landing centres, aquaculture farms, processing facilities, India is the third largest producer and exporter of shrimp in Asia. Being the top exporter of shrimp to Japan, India is also among the major suppliers of tropical shrimp to the EU and US markets. Recent trade policies announced by the Government of India may also facilitate shrimp imports into India for reprocessing and export.

Global Supply

With a turnover of more than US\$ 10 billion, shrimp is undoubtedly the

leading fishery commodity in the global seafood market. Shrimp production from capture and culture fisheries has increased steadily during the last decade and reached an all-time high of 3.85 million mt in 2000. The aquaculture sector contributed 22.5% of the total production, while the rest came from capture fisheries. PR China contributed 25% of the shrimp production, while Indonesia, India and Thailand each accounted for 10% of the total. The black tiger shrimp, *Penaeus monodon*, was the main species produced, representing 19% of the total global production and most of the tiger shrimp production came from aquaculture.

In 2000 famed shrimp production increased by more than 6% over the previous year, settling at about 865000 mt. Asia, the major producer of farmed shrimp, contributed more than 87% of world production. Black tiger shrimp (*Penaeus monodon*), accounted for more than 55% of the total aquaculture production, followed by the Western white shrimp, *Penaeus vannamei*. Thailand retained its position as the world's top producer of aquacultured shrimp while production from PR China, Indonesia and India remained stable in 2000. New producers in Asia such as Bangladesh and Vietnam have emerged to further enhance Asian dominance. Farmed shrimp from Latin America decreased markedly by 33% in 2000 due to viral disease, compared to 1999 paca. Shrimp 2001 Chennai will look at sev-



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eral issues related to the global supply, such as;

- Outlook for the coming years and how has the industry coped with the problem of white spot and other devastating diseases?
- What are the latest technological developments, especially in response to the increasing demand for environment friendly culture practices?

World market

Global shrimp exports reached an all-time high, for the first time in 2000, showing an increase of 11% over the previous year. Shrimp accounted for 20% of the total world trade in fishery products. While shrimp from capture sources were stagnating, aquaculture provided a major thrust for increased shrimp business over the last decade.

During 2000, US shrimp market expanded further despite the economic slowdown towards the end of the year. Most of the Asian countries increased their shrimp exports due to lower exports from Ecuador while Thailand remained the main supplier to the US with 35% share. Peeled and cooked products are beginning to dominate the US market replacing shell-on tails. With the exception of Bangladesh, most Asian countries increased their exports to the US while Ecuadorian and Mexican supplies to the US market declined during the year 2000.

Japan, another major shrimp importer, affected by negative factors and stagnating demand, created further uncertainties in the market. The main suppliers to Japan are Indonesia and India, supplying nearly half of the Japanese requirement. Vietnam has become an important supplier of peeled stretched shrimp to the Japanese requirement. Vietnam has become an important supplier of peeled stretched shrimp to the Japanese market in 2000.

The European shrimp market was strong in the closing months of 2000. Improvement in the economic conditions and higher consumption in the food service level facilitated an upward market trend. Before the drop in shrimp production, Ecuador was the top supplier of tropical shrimp to the EU until 1999. Europe traditionally preferred head-on shrimp but the preference is somewhat diminished as shrimp farming countries deliver a wide range of value-added products. Having so many uncertainties and changing conditions in the world market, Shrimp 2001 will examine;

- Whether the slow down of the US economy will affect demand and price, especially in the face of im-

some countries' products, even being banned. Exporting countries needed to change their production practices and facilities to comply with the regulatory and quality/safety requirements, in order to regain the markets.

Consumer activism triggered by often well meaning environmentalists is another problem overshadowing the industry. Aquaculture is often blamed by environmental groups for environmental problems. Eco-labeling, genetically modified organisms (GMOs) and organic farming are new issues facing today's shrimp industry. In facing such issues it is pertinent for the industry to take a new approach for aquaculture development and the panel of experts will discuss these aspects to develop

Japan, another major shrimp importer, affected by negative factors and stagnating demand, created further uncertainties in the market.

The main suppliers to Japan are Indonesia and India, supplying nearly half of the Japanese requirement

proved supplies from Latin America,

- What's in store in the Japanese market for the coming years, and the consequent effect on the prices of shrimp products?

Quality, Environment and other issues

Starting from December 1997 the USFDA made it mandatory to implement HACCP programmes in the fishery sector for both domestic and imported products. On the other hand, the EU tightened its quality requirements based on HACCP. Japan revised its Food Sanitation Laws in line with HACCP principles. The implementation of regulations on quality/safety posed several problems to the exporters, with

sustainable aquaculture and responsible trade.

The Organisers

INFOFISH is the intergovernmental organisation for marketing information, technical advisory and consultancy services to the seafood industry in the Asia-Pacific region and beyond. Based in Kuala Lumpur, Malaysia, INFOFISH has an excellent track record for organising highly successful international conferences.

MPEDA, The Marine Products Export Development Authority of India, is the nodal agency under the Ministry of Commerce and Industries, Government of India, for the development of the Indian seafood industry and trade.

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Established in 1972, MPEDA is committed to helping the Indian seafood industry by extending technical and financial support. MPEDA also organises a biennial seafood exposition - the India International Seafood Show.

FAO-GLOBEFISH is the fish utilisation and marketing service under the Fishery Industries Division of the Food and Agriculture Organization of the United Nations. GLOBEFISH disseminates market information for the global seafood trade through market and product reports under a series called "GLOBEFISH Research Programme". Based at the FAO headquarters in Rome, Italy, GLOBEFISH serves the world seafood industry in a number of ways, covering fishing, aquaculture, post-harvest aspects and marketing.

SEAI - The Seafood Exporters' Association of India is the largest apex body and unequivocal voice of the Indian seafood industry. Established in 1969 with headquarters in Cochin, the cradle of the Indian seafood industry SEAI has branches in all major production centres in India, from Gujarat in the west to West Bengal in the east. Members of SEAI are represented in almost all forums and boards connected with exports

Conference Venue

SHRIMP 2001 will be held at the luxurious Le Royal Meridien Hotel in Chennai, the charming capital city of the state of Tamil Nadu in southern India. Chennai, formerly known as Madras, is the key centre of India's booming shrimp culture industry. Located just 10 minutes' drive from the Chennai International Airport and within easy reach of the business district, the Le Royal Meridien offers first class hospitality and comfort.

Chennai, known for its temples, also has some of the oldest churches. The most prominent among them is the Basilica of St. Thomas. A long coast on

the eastern side of the city provides the world's second largest beach, the Marina beach. This cosmopolitan city has a place for people from all religions. September in Tamil Nadu is the time for Navaratri or "nine nights", a popular festival in southern India marked by many lights.

Registration Fees

US\$550 per delegate for registrations received before 15 July or US\$650 if received after that date. The fee covers coffee breaks, lunches, a reception, conference kit and documentation. An additional fee of US\$150 entitles accompanying spouse to lunches and reception only.

There is a special concessionary fee for delegates from INFOFISH member countries - US\$400 received before 15 July or US\$500 thereafter. INFOFISH member countries are Bangladesh, India, Indonesia, DPR Korea, Malaysia, The Maldives, Papua New Guinea, Solomon Islands, Sri Lanka and Thailand.

Applications for registration should be made using the conference registration form photocopies of the form are acceptable. Kindly return the form with full payment to INFOFISH by fax (603 2691 6804), e-mail (infish@po.jaring.my

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Trade and Investment Seminar

A trade and investment seminar will be held on the afternoon of the second day of the conference (28th September) to promote and catalyse investment in shrimp production, export processing and marketing. Those who wish to make presentations in this session are requested to get in touch with INFOFISH.

Technical and Poster Presentations

Scientists and other individuals interested to present the findings of their research work, experience papers etc. are invited to do so in the special technical session which will be held on the afternoon of the third day of the conference (29th September 2001). Technical papers can also be offered as poster presentations. Kindly contact INFOFISH for further details if you wish to make a presentation.

Post Conference Trips

Visits to shrimp farms and other places of aquaculture interest in and around Chennai will be arranged after the conference. Those interested to join these field trips are requested to indicate their interest to get more details.

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TAXATION

Gist of Important Changes made by the Finance Act, 2001 in the area of Direct Taxes

PRIOR TO THE BUDGET

Income	Standard Deduction
Upto Rs. 1 lakh	Rs. 25,000
Rs. 1 lakh to Rs. 5 lakh	Rs. 20,000
Above Rs. 5 lakh	Nil

Rebate u/s 88 :
@ 20% uniformly

Deduction u/s 80L

The limit of Rs. 15,000 per annum was proposed to be reduced to 9,000 per annum

Valuation of Perquisites

Valuation of various perquisites to be done as per Income Tax Rules

TDS on Interest on Term Deposits (Section 194A)

TDS on income from interest on time deposits if such income exceeds Rs. 10,000 in respect of deposits with a bank or housing finance, company and Rs. 5,000 in other cases. In the Budget, the limit was proposed to be reduced to Rs. 2,500.

Deduction towards interest on housing loans for self occupied houses

Rs. 1,00,000

Deduction for Repairs for house property

25% of annual value

Due Dates for filing Return of Income

- For salaried employees - 30th June of the assessment year
- For business or profession where accounts are not required to be audited - 31st August.
- For non-corporate assesses who are required to get their accounts audited - 31st October
- For companies assesses - 30th November

Filing of Return of Loss

There was no requirement of filing return of income in case of loss unless the loss in cutted in the previous year was to be carried forward and set off in subsequent years.

AFTER THE BUDGET

Income	Standard Deduction
Upto Rs. 1,50,000	Rs. 30,000
Rs. 1,50,000 to Rs. 3,00,000	Rs. 25,000
Rs. 3,00,000 to Rs. 5,00,000	Rs. 20,000
Above Rs. 5 lakh	Nil

Those having income upto Rs. 1 lakh will get rebate u/s 88 @ 30% instead of 20%.

The limit has now been fixed at Rs. 12,000 per annum (the additional deduction of Rs. 3,000 is for interest on Government securities)

Perquisites to be taxed on the basis of their costs to employer except in respect of houses and cars.

The limit for applicability of TDS provisions has now been fixed at Rs. 5000.

TDS will be deductible @ 10% on income exceeding Rs. 2,500 by way of commission, brokerage etc. except on transactions relating to shares and securities.

Rs. 1,50,000

30% of annual value (with no further deduction except for interest on housing loans).

- For non-corporate assesses whose accounts are not required to be audited - 31st July.
- For corporate assesses, and non-corporate taxpayers whose accounts are required to be audited - 31st October.

All companies are required to file income tax returns whether they are generating profit or not.

Interest on External Commercial Borrowings (ECB)
Interest payable on ECB is exempt from tax

Capital Gains

Deduction for Research & Development (R&D)

Weighted deduction for R&D @ 150% for in-house research and development in certain areas is allowed to companies

Tax Holiday

Depreciation

Transfer Pricing

There were no separate specific provisions to check tax avoidance by abuse of Transfer Pricing

Export Profits

The export profits to be taxed as under:

Assessment year	Taxable Profit (as a % age of total export profit)
2001-02	20%
2002-03	40%
2003-04	60%
2004-05	80%
2005-06	100%

Charitable Trust & Funds

The Finance Bill 2001 proposed to publish the accounts of those charitable trust and funds having annual receipt of Rs. 10 lakh or more.

This exemption has been withdrawn for such borrowing made on or after 1st June, 2001.

- Long term capital gain arising from sale of securities is exempt if invested in primary issues
- There will be no capital gains tax liability for transfer of assets to facilitate de-mutualisation and corporation of stock exchanges

Weighted deduction @ 150% has been extended to biotechnology as well for clinical trials, filing patents and obtaining regulatory approvals.

10 year tax holiday provided to the developers of Special Economic Zones (SEZs). The income of investors making long term investment for the development of SEZs will also be exempt.

Rate of depreciation increased to 25% for shipping industry and accelerated depreciation @ 50% on new commercial vehicles for one year.

Provisions for Transfer Pricing has been introduced and the CBDT is in the process of making rules for Transfer Pricing. Also, Transfer pricing provisions have been modified with a view to clarify that these regulations shall also apply to transactions between the Head Office and its branch and that adjustment made to the transfer price in the case of one enterprise shall not by itself form the basis of a consequential adjustment in the case of the other enterprise.

Assessment year	Taxable Profit (as a % age of total export profit)
2002-03	30%
2003-04	50%
2004-05	70%
2005-06	100%

Now, charitable trusts and funds having annual receipt in excess of Rs. 1 crore are required to publish their accounts.

Prepared by Taxation Department, FICCI

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